Grazing and Timber Integration Manual

Lands Division & Forestry Division
Alberta Sustainable Resource Development
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Table Of Contents

Acknowledgements Page 3
Executive Summary Page 4
Grazing and Timber Integration Manual Page 5
1. Introduction Page 5
2. Objectives Page 7
3. Regional Grazing Timber Advisory Committees Page 8
4. Regional Grazing Plans Page 9
5. Operating Standards Page 18
6. Dispute Resolution Process Page 25

Appendices

Appendix 1 Regional Grazing Timber Integration Advisory Committees Draft Terms of Reference Page 28

Appendix 2 Guidelines to Process Land Disposition Request (LDR) Application for Grazing Page 31

Appendix 3 Grazing and Timber Agreement Requirements Page 39

Appendix 4 Grazing Timber Agreement Template Page 44

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Executive Summary

In 2003, the beef and timber industries approached Sustainable Resource Development (SRD) to address concerns and interests regarding the integration of existing and new overlapping grazing and timber dispositions in Alberta. The timber industry, represented by the Alberta Forest Products Association (AFPA) were concerned about the impacts that existing and new grazing dispositions may have on their timber dispositions, including reforestation plans and interests. The beef industry, represented by the Alberta Beef Producers (ABP) were concerned about the impacts that timber dispositions and reforestation activities may have on their grazing plans, forage production, and infrastructure. In addition, the ABP requested SRD to provide new grazing opportunities in the Green area to feed a growing beef herd.

A number of meetings were held over the past two years between the beef and timber industry representatives and SRD. Grazing timber related concerns, issues, needs, and opportunities were discussed. Meetings between industry and SRD were successfully concluded in May 2006, and have resulted in the development of a new SRD grazing and timber integration policy and manual. These documents will direct and guide the government and industry towards a successful integration of grazing and timber business practices in the green area, and white area public lands managed for sustained yield of timber and forage.

Pursuant to the Integration of Grazing & Timber Activities Policy Directive June 2006, the Grazing and Timber Integration Manual outlines the requirements for successful integration based on current knowledge and experience in Alberta. The manual contains four major requirements to guide the beef industry, timber industry, existing and new overlapping grazing and timber dispositions. These requirements include:

- A regional grazing timber integration advisory committee made up of local beef and timber industry representatives to advise SRD on matters of grazing and timber integration;
- Regional grazing planning to identify areas of potential grazing opportunity, reflect landscape grazing timber integrated management decisions, and provide a strategy for grazing allocation within identified areas of the green area, and white area lands with timber commitments;
- Operating standards for grazing and timber integration, which set definitive statements of the desired result to be achieved and a clear expectation of what is expected. The standards can be measured, understood, achieved, monitored, reported, and enforced for compliance; and
- A dispute resolution process developed to help resolve non-agreement and disputes between grazing and timber disposition holders.

Grazing and Timber Integration Manual

1. Introduction

This manual contains the requirements to guide the beef industry, timber industry, and Sustainable Resource Development (SRD) staff[1] in the integration of grazing and timber activities regionally and on overlapping grazing and timber dispositions. This manual is enabled and in accordance with the Lands Division and Forestry Division Policy Directive on *Integration of Grazing & Timber Activities.*

In summary, the manual outlines:

- Objectives
- Regional Grazing Timber Advisory Committees
- Regional Grazing Plans
- Grazing Disposition Application Process
- Standards for Integration of Grazing & Timber Operations
- Dispute Resolution Process

Scope of Application

The manual applies to green area public land and also white area public land identified for sustained yield timber management. Policy Directive LMD 95/2 outlines standards for timber harvest on public land in the white area not designated for sustained yield timber management. The Land Division and Forestry Division policy directive on *Integration of Grazing & Timber Activities* outlines the strategy to transition to the requirements in this manual to existing and new dispositions.

Definitions

Existing Dispositions – Refers to current grazing or timber dispositions that were issued prior to the effective date of this policy and manual. This includes renewals of such dispositions, and current grazing allotments in the Rocky Mountain Forest Reserve.

New Dispositions - Refers to grazing or timber dispositions issued after the effective date of this policy and manual.

Other Plans, Policies, & Standards

Regional Grazing Plans (RGP) will assist in addressing grazing and timber interests at a landscape scale in order to minimize integration conflicts by ensuring all existing dispositions are addressed in planning and by guiding the issuance of new grazing dispositions on lands where grazing is not currently allocated. Overlapping grazing and timber harvest operations on approved dispositions will conform to

[1] Where SRD is referenced in this document, this refers to a joint decision between the Rangeland Agrologist and Forester/Forest Officer, or the Range Manager and Forestry Manager. Fish and Wildlife and Forest Protection Branch staff are also involved in referral and development processes.

direction outlined in Grazing Timber Agreements (GTA) described later in this document. Both RGPs, and GTAs conform to higher order plans, policies, and guidelines such as Integrated Resource Plans (IRP), Forest Management Plans, Species Recovery & Management Plans, FireSmart Community Protection Plans, Resource Integrated Decisions, Eastern Slopes Policy, Fish and Wildlife Policy for Alberta, and Integrated Resource Management strategies.

Overlapping grazing and forestry operations will also adhere to existing standards and guidelines for timber harvesting (i.e. all the operating ground rules and regeneration standards) and grazing (i.e. disposition range & riparian health standards, methodology for calculating carrying capacity). It is not the intent of the operational standards to supersede or re-state current operational requirements for grazing or timber. Further, watercourses, soils, fisheries, fisheries habitat, wildlife, wildlife habitat, and other resource values and uses will be protected with overlapping grazing and timber operations. However, it is recognized that most of the other resource values and uses will be addressed in the RGP and during the disposition application and review process. Where other values and uses are not addressed through these processes, they will be addressed in the operation of the grazing disposition and Grazing Timber Agreement, if applicable.

Implementation

This manual will be reviewed by SRD after two years of implementation (June 2008), and then as required to address implementation issues or new information.

The following transition strategy will be employed:

- All aspects of the policy and manual will be effective June 2006, except for the Operating Standards in Section 5.0 of the manual.
- Grazing Timber Agreements are required for "new activity", or as otherwise requested by the disposition holders on existing overlapping dispositions as per procedure 6.
- Operating Standards will apply to new grazing dispositions issued after the effective date of this policy, existing grazing dispositions[2] upon renewal, and timber dispositions, which overlap with grazing dispositions.
- The Operating Standards will be implemented utilizing the following condition on new grazing dispositions, grazing dispositions at time of renewal, and the Annual Operating Plans for timber dispositions that overlap with new or renewed grazing dispositions:

> "Unless otherwise authorized in writing by the Minister, the disposition holder shall comply with the Operating Standards for Grazing and Timber Integration, as specified in the *Grazing and Timber Integration Manual*, 2006, published by Sustainable Resource Development, as amended".

[2] Grazing dispositions refer to licences, leases, and grazing permits (head tax permits and permits in the Rocky Mountain Forest Reserve).

2. Objectives

Objectives related to integration of grazing and timber operations:

1) Minimize impact of timber harvest and silviculture operations on infrastructure and carrying capacity of rangelands for domestic livestock grazing.
2) Minimize impact of grazing operations on regeneration per regeneration standards in the *Alberta Regeneration Survey Manual* and maintenance of site productivity for timber supply
3) Minimize the impact of overlapping grazing and timber operations on other resource values and uses.

3. Regional Grazing – Timber Integration Advisory Committees

Regional Grazing-Timber Integration Advisory Committees will be established to advise SRD on matters of grazing and timber integration. Local beef and timber representatives will chair and participate on such committees, and work with their industries and SRD to foster shared planning and good relations, awareness and education, and research. These committees will be established by SRD with approved terms of reference and membership representative of the industries. A draft terms of reference is found in **Appendix 1**.

4. Regional Grazing Plans

Overview

The Regional Grazing Plan (RGP) will:

1) Identify areas of potential grazing opportunity, while addressing existing grazing disposition holders needs,
2) Reflect landscape grazing timber integrated management decisions, and
3) Provide a strategy for grazing allocation within identified areas of the green area and white area lands with timber commitments.

The following diagram outlines the RGP process.

Regional Grazing Plan
Inventory & Assessment of Planning Area
Collect resource and land use information
Delete administrative and environmental constraints
Do a regional grazing assessment
Integrate timber harvest/ reforestation information with grazing information
Develop grazing-timber map
Grazing Allocation Prioritization
Allocate grazing dispositions based on industry recommendations
Integrated Management Options
Fixed grazing disposition boundary
'Roving' grazing disposition
Grazing LDR Application & Advertisement
Grazing licence is preferred disposition choice
LDR application process

Regional Grazing Plans are developed in regions of high grazing demand with unallocated forage, or regions where high levels of timber integration are required, as determined by SRD.

***Note**: The following process to develop Regional Grazing Plans only applies to regions where grazing is unallocated. This process and outcomes would need to be modified for regions where SRD determines that regional planning is required for integration purposes, but grazing has been allocated (ie. The Rocky Mountain Forest Reserve)*

The major outcomes of developing a RGP will include:

- Strategies to address the beef and timber industries' recommendations for grazing and timber integration (September 04/04 report);
- Guidance to the livestock producer(s) and SRD staff to make informed choices and decisions about grazing opportunities in identified areas of green area and white area with timber commitments;
- Identification of potential opportunities for grazing timber integration in a manner that proactively helps reduce land use conflicts;
- Reduced costs and improved efficiencies to the industries;
- Regional grazing assessment information that can be integrated in the development of Detailed Forest Management Plans; and
- A strategy to guide allocation of grazing dispositions in the planning area that addresses existing grazing disposition holders' interests prior to new allocation.

Regional Grazing Plans will be recorded in SRD's Land Standing Automated System (LSAS), or its successor, for disposition management purposes.

Regional Grazing Plan Development

The following integrated grazing timber business rules will be applied to develop a RGP.

Roles & Responsibilities:

1) SRD local staff will be involved in the development of the RGP – rangeland agrologist, forester/forest officer, fisheries biologist, wildlife biologist, local wildfire staff, and resource information specialist. The Executive Directors for Rangeland and Forest Management will provide final approval of the RGP. Disagreements that arise during the development of the RGP will be mediated by the Range Manager and Forestry Manager according to the SRD approach to joint decision-making. The Regional Grazing Timber Integration Advisory Committees will advise SRD in development of the RGP (see Appendix 1).

2) RGP Trigger – SRD Range and Forestry Managers will make a joint decision to carryout a RGP based on the number and location of grazing applications and level of integration issues. Prioritized RGP areas include the Edson, Whitecourt, Grande Prairie and Rocky Clearwater areas. Areas that have a less immediate priority for an RGP include the Rocky Mountain Forest Reserve as these areas are fully allocated. However, the need for integration of grazing and timber is extremely high and will be addressed through the forest management planning process, the Land Disposition Request (LDR) application and review process, and operational solutions such as Grazing Timber Agreements as outlined in section 5.0.

3) RGP Planning Boundary – The initial planning boundary is based on all or a portion of the Forest Management Unit (FMU) and combinations of FMUs including white area public lands with timber commitments. The finalized planning boundary may be modified to meet the number and location of the LDR applications for grazing and

integration issues, and other factors such as access, bio-geographic zones, and the location of existing grazing and timber tenure.

4) Developing a RGP Map – SRD is responsible to develop the RGP product and accompanying information. The RGP map uses a 1:125,000 assessment scale. The map will be developed by collecting various digital information layers (e.g. land use dispositions, forest vegetation inventory, grazing, reforesting cutblocks, natural features/base features such as hydrology, fish and wildlife resource information, etc.). These layers would be integrated in GIS to produce a RGP map that identifies areas that are potentially available for grazing consideration, and areas that are not available. The Regional Grazing Timber Integration Advisory Committee would advise SRD in development of the RGP map, integrated management decisions, allocation of range resources, as well as other information. The timber and reforestation information would be provided by the identified forest industry, e.g. Forest Management Agreement holder. Individual SRD staff will be responsible for providing information relative to their areas of interest.

A. Business Rules to Determine the Land Base Not Available for Grazing

The following areas would not be available for new grazing opportunity consideration. Documentation of this procedure, complete with rationale, will be included in the RGP:

i. higher level plans, policy direction, legal agreements and/or legislation that identified areas not available for grazing;
ii. for the purposes of determining the sustainable regional carrying capacity, areas currently proposed for timber harvest in the Forest Management Plan 10 year harvest sequence, Annual Operating Plans, and regenerating cutblocks that have not met performance standard (this is to ensure regional grazing carry capacity calculations aren't inflated if agreement isn't reached to graze cutblocks prior to meeting regeneration standards. The intent is that operationally, grazing prior to cutblocks meeting regeneration standards can occur as long as the two parties agree to it, a GTA is developed and approved by SRD, between the two parties. See Section 5.0 Operating Standards for more detail)[3];
iii. private land;
iv. existing and proposed parks, federal lands, wilderness areas, other protected areas, prime protection and conservation areas;
v. areas with accessibility constraints and operationally isolated areas;

[3] Regarding RGP business rule A) ii although not included in the calculation of the regional carrying capacity, imminent harvest blocks and young cutblocks may be included at the grazing disposition level. These areas may not be available for grazing in the short term, however, available for grazing in the long term. Grazing of young cutblocks may be grazed at the disposition level providing both parties agree to it and a GTA is developed and approved by SRD. Approved grazing in cutblocks follows SRD's methodology for calculating carrying and grazing capacity.

vi. existing dispositions that do not contribute to grazing opportunity, eg. recreation lease, large oil and gas sites, sand and gravel pits, grazing dispositions and compressor stations;
vii. reservations such as PNTs that restrict grazing and research study areas;
viii. high priority fish and wildlife habitat such as caribou, grizzly, and endangered species;
ix. identified key/critical ungulate areas where grazing cannot be integrated[4];
x. sensitive soils/steep slopes, organic wetland complexes, AVI polygons with a wet modifier;
xi. identified permanent rivers and lakes (areas such as the North Saskatchewan River, Mcleod River, and Obed Lake, and identified fish bearing areas that have deeply incised valley slopes and critical fish bearing habitat)[5];
xii. other exclusions such as strategic areas on the landscape to minimize wildfire risk (wildfire 'doors') as identified by Forest Protection Branch[6].

B. Business Rules to Determine Land Base Available for Grazing Opportunity

The following business rules will be applied to locate areas in the planning area available for LDR application for grazing.[7]

i. Grazing information layer (1:125,000 scale map and table) will be developed to identify the sustainable regional carrying capacity[8] in Animal Unit Months (AUM) from the available land in the RGP. The regional carrying capacity will be based on the most recent forest cover information available, and ecologically sustainable stocking rates. Riparian plant communities will not be assigned a carrying capacity. The map will show the average stocking rate (ha/AUM) of large polygon forest cover areas, such as aspen, mixedwood, conifer, etc. Information will be stratified according to Alberta Natural Subregions (eg. Lower Foothills, Dry Mixedwood). AUMs will also be reduced to reflect deferral of grazing from reforesting cutblocks until performance regeneration standards have been achieved. A timeframe for when cutblocks will be available for grazing will be established based on the forest types and local knowledge for the planning area.

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[4] There may be areas that fit with this business rule, however, are too small a scale to be shown on the RGP map. These areas can be deleted from grazing opportunity considerations during the application process.
[5] There may be areas that fit with this business rule, however are too small a scale to be shown on the RGP map. These areas can be deleted from grazing opportunity considerations during the application process.
[6] The Firesmart community protection plan will be assessed in the development of the RGP, for specific issues which affect grazing – timber integration, and to ensure the RGP is in alignment with the wildfire community protection plan. The strategic landscape areas or 'fire doors' may be available for grazing depending on the circumstances and tactics to minimize wildfire risk.
[7] Additional, or reallocation of existing resources may have to be provided to assist SRD develop these information layers and products. Request assistance from the SRD Resource Information Management Branch, eg. GIS assistance and developing map products.
[8] The sustainable regional carrying capacity of the RGP is based on ecologically sustainable stocking rates based on 25% of the total understory production of forest rangeland plant communities. For detailed information see SRD website http://www.srd.gov.ab.ca/land/m_rm_technical.html (Methodology for Calculating Carrying and Grazing Capacity on Public Rangelands). Ecological sustainable stocking rates combined with appropriate grazing management is intended to provide a sustainable grazing footprint on the landscape.

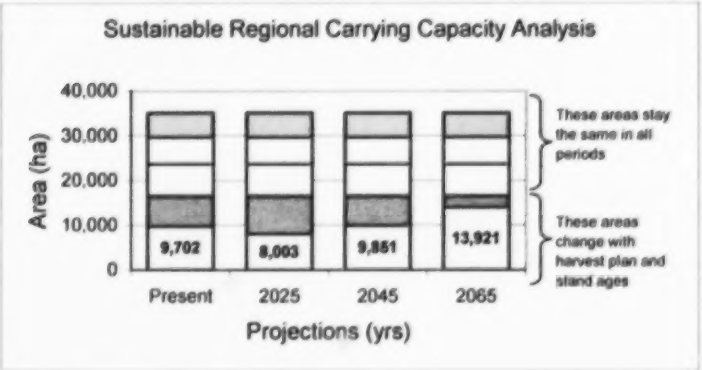
ii. Timber and Reforestation information layer (1:125,000 scale map and table) will be developed to identify the existing and planned cutblocks, – distinguishing between cutblocks that have and have not met performance regeneration standards.

Note that the ability to graze such areas will be determined through development of a Grazing Timber Agreement, which is approved by SRD. An exception is current grazing in existing dispositions where no concerns exist. See Section 5.0 Operational Standards for more detail.

This information layer would be based on the 10 year timber harvest sequencing and projecting change in vegetation/ AUMS over a time period e.g. 60-100 years depending of if deciduous or coniferous, in 10 year periods (or 5 year periods if available) ie. Year 0, 10, 20, 30, 40, 50, 60 (end here w/ deciduous), 80, 90, 100). Areas that are currently proposed for timber harvest in the Forest Management Plan 10 year harvest sequence, Annual Operating Plans, and cutblocks that have not met performance regeneration standards *but are approved for grazing under a Grazing Timber Agreement*;

iii. RGP Map (Combined Grazing, Timber and Reforestation Map at a scale of 1:125,000 scale and Table). This RGP map will merge information in 5 B i. and ii. and produce a map and table that shows the sustainable regional carrying capacity available in a harvest sequence. Areas of planned timber harvest will not be included in the sustainable regional carrying capacity calculations. Only areas that have met performance reforestation standards will be included in the sustainable regional carrying capacity calculation. The overall sustainable regional carrying capacity for the RGP would be reduced to reflect the lowest carrying capacity based on the amount of timber harvest activity. The sustainable regional carrying capacity and RGP map are based on the final time period map – i.e. Year 60 (deciduous), Year 100 (coniferous).

The following diagram shows an example sustainable regional carrying capacity (AUM) calculation of 3,034 AUMS for an RGP area.



	Present	2025	2045	2065
Administrative Exclusions	**5,498.7**	**5,498.7**	**5,498.7**	**5,498.7**
Environmental Exclusions	6,008.1	6,008.1	6,008.1	6,008.1
Non-Use Areas	7,104.3	7,104.3	7,104.3	7,104.3
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
Available Not Grazing Area	9,702.4	8,002.8	9,850.8	13,921.1
Total Area	35,143.9	35,143.9	35,143.9	35,143.9
Available AUM in period	**3,556**	**3,034**	**3,638**	**5,096**

iv. Grazing Allocation Priorities – Allocation of potential LDR application grazing areas will be based on the following priorities. The priorities are intended to reduce the overlap of grazing and reforesting cutblocks:

***Priority 1** – Suitable and available vacant white area lands.*

***Priority 2** – Suitable and available white area lands designated for sustained yield timber management.*

***Priority 3** – Suitable and available green area land with no planned timber harvest in the term of the proposed grazing disposition, and cutblocks have met the applicable regeneration standard* [9].

[9] These sites contain older cutblocks that have met a deciduous establishment regeneration standard (cutblocks which have passed the 3-5 year survey), or a coniferous/mixedwood performance regeneration standard (cutblocks which have passed the 8-14 year survey), and timber harvesting is not planned within the next 10 years. Cutblocks subject to enhanced forest management strategies with crop plans for

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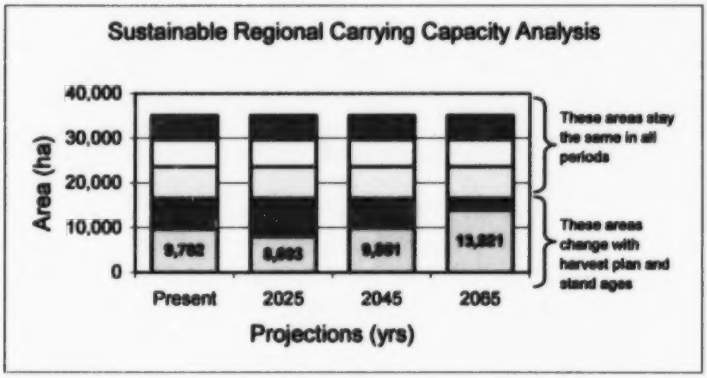

	Present	2025	2045	2065
Environmental Exclusions	6,008.1	6,008.1	6,008.1	6,008.1
Non-Use Areas	7,104.3	7,104.3	7,104.3	7,104.3
Available Net Grazing Area	9,702.4	8,002.8	9,850.8	13,921.1
Total Area	35,143.9	35,143.9	35,143.9	35,143.9
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[9] These sites contain older cutblocks that have met a deciduous establishment regeneration standard (cutblocks which have passed the 3-5 year survey), or a coniferous/mixedwood performance regeneration standard (cutblocks which have passed the 8-14 year survey), and timber harvesting is not planned within the next 10 years. Cutblocks subject to enhanced forest management strategies with crop plans for

***Priority 4** – Suitable and available green area land with timber harvest plans, or regenerating cutblocks, but where grazing can be accommodated.* Within this category, 3 options in terms of priority exist:

1) Future allocations include enough range to avoid use of regenerating cutblocks,
2) Existing allocations should be reviewed for expansion or relocation to compensate for lost range, and avoid the need to graze within regenerating cutblocks,
3) If unavoidable, regenerating cutblocks can be included for grazing as long as the two parties agree to it, and a Grazing Timber Agreement is developed (see Operating Standards in Section 5.0 for more detail).

v. The RGP is reviewed every 10 years, or as necessary, to coincide with development of applicable Forest Management Plans. This review will also include any timber, reforestation, biodiversity, and fish and wildlife changes. The review period may be modified based on the situation and changes such as major wildfires, Firesmart prescribed burns, disease, and insect outbreaks.

vi. The RGP can be queried as to the spatial location of AUMs applied for, relative to the grazing allocation priorities under various scenarios. Some RGP's may have scenarios that are suitable for large and/or small grazing LDR application needs, e.g. application for 200 AUMs and/or 2000 AUMs.

Regional Grazing Integrated Management Options

The RGP will outline a strategy for allocation of LDR applications for grazing based on, but not limited to, the following grazing-timber integrated management options. These options will be dependent on the amount and distribution of available AUMs, amount of existing grazing allocations, the structure of the local grazing community (i.e. small independent operations, organized associations), economics of re-locating grazing infrastructure, and the number of current and potential integration issues. Addressing existing disposition holder interests is a priority in development of the regional grazing management option and allocation strategy.

Once integrated management decisions are made by SRD, these will guide the development of allocation of range resources through LDR applications for grazing. It will assist the potential grazing applicant and SRD staff in:

- Obtaining a grazing disposition;
- Processing the application;
- Making a joint integrated decision between the Range Manager and Forestry Manager to reject or accept the application;
- Developing the advertisement;
- Establishing the terms and conditions of the grazing disposition contract; and

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treatments beyond the performance regeneration survey period may require deferral until such treatments have been completed.

- Helping frame the requirements for the development of a Grazing Timber Agreement (see section 5.0).

Option 1- Fixed Grazing Disposition Location Option

This management option involves a grazing disposition that has a fixed boundary over time (current disposition allocation and management process) SRD will determine the boundary for tender/ auction purposes. The area is large enough to provide the flexibility to integrate grazing and timber over the term of the grazing disposition, and future renewals. The LDR application carrying capacity will be set at the lowest carrying capacity based on reducing the AUMs found within current and proposed cutblocks, which have not met the performance regeneration standard. During the times that timber harvest and reforestation interests do not occur in the grazing disposition, the additional grazing disposition carrying capacity (cc) can be made available for a limited time as determined by SRD.

For example, in a case where 50% of the grazing disposition is scheduled for harvest the cc would be reduced by 50%, e.g. a section of land that is aspen and a stocking rate of 6.4 acres/AUM = 100 AUMs (640 acres divided by 6.4 acres/AUM) would have a grazing disposition sustainable carrying capacity of 50 AUMs. During those times that timber harvest and reforestation interests were not in effect, the grazing disposition holder could graze at the 100 AUM level, e.g. using a bonus system.

In this option, it is important that the area chosen for LDR application for grazing has available grazing in a configuration [10] so that the sustainable carrying capacity level is practical and economical. A larger sized grazing disposition can assist in achieving this balance.

> ***Note**: A Grazing Timber Agreement between both disposition holders is required on grazing dispositions where grazing, timber and reforestation interests overlap (see policy directive for more detail). Temporary fencing of cutblocks and other areas may be required as well as agreement on timing of activities between both industries.*

Option 2- Roving Grazing Disposition Location

This option is a new concept and would require a thorough policy and process review by SRD prior to implementing this option.

This management option involves adjustment or re-location of the disposition at the time when timber harvest and reforestation interests come into effect. This conceptual option provides opportunity for grazing, while intending to avoid overlap with reforesting cutblocks. In this option, the grazing disposition is relocated to areas that do not have timber harvest plans or reforesting cutblocks for the term of the grazing disposition, e.g. 10-year grazing license. When the grazing disposition area is required for timber harvest and reforestation

[10] The sequence of stands to be timber harvested in the 10 year sequence of the Forest Management Plan, and annual operating plans, contained within a grazing disposition, should be timed to minimize the impact of harvest on carrying capacity over time. This also requires consideration of the location of regenerating cutblocks not available for grazing. Selection of grazing disposition boundaries should consider the proposed timing of timber harvest of stands in order to facilitate practical and economical grazing.

interests, the grazing disposition could be renewed and adjusted or relocated to another non-overlap location. The forest management plan harvest sequence should address reducing or minimizing the frequency of grazing disposition adjustment or relocation.

> ***Note:*** *Relocation of a grazing disposition may require both disposition holders to discuss costs and logistics regarding the relocation of infrastructure. This choice does not require the fencing out of cutblocks. This option will need to be clearly understood by the committee, SRD and any LDRs prior to sale. Large grazing disposition areas within the fixed grazing management option may achieve similar results.*

Grazing Application, Advertisement, & Allocation

A grazing application on lands in the green area or white area with timber commitments will follow the process of planning and operational decision making to accept or reject a grazing application outlined in **Appendix 2.**

The preferred grazing disposition choice is a grazing licence. Grazing permits and Head Tax Permits may be considered in specific circumstances. For example, to solve short term grazing timber integration conflicts larger grazing dispositions to associations of cattle producers should be considered to facilitate integration with the timber disposition holder, maintain carrying capacity, and minimize the need for grazing in regenerating cut blocks. Further, the location of new allocations should consider the location of existing allocations and their needs in terms of potential expansion or additional forage needs.

> ***Note:*** *Grazing dispositions that are under renewal will be renewed to the same disposition type. For example, a licence will be renewed to a licence, and a lease to a lease.*

5. Operating Standards - Grazing & Timber Integration

This section outlines the standards for integration of operations with overlapping grazing and timber dispositions. The standards are definitive statements of the desired result to be achieved and a clear indication of what is expected. The standards can be measured, understood, achieved, monitored, reported, and enforced for compliance.

Operational Planning Standards

Grazing Timber Agreements

A Grazing & Timber Agreement (GTA) is an agreement between the grazing and timber disposition holders, which outlines how the two proponents will participate in their activities in an integrated fashion. GTAs are necessary when there is proposed activity by one of the disposition holders that could affect the interests of the other disposition holder. Examples of such activity include: grazing in a regeneration cutblock, timber harvest in a grazing disposition boundary, or grazing disposition fenceline development involving timber removal. The GTA is jointly developed by the timber disposition holder and grazing disposition holder well in advance of timber and grazing operation approvals, and endorsed by SRD.

> ***Note**: The Forest Resource Improvement Association of Alberta (FRIAA) needs to be a signatory to a GTA for timber permits where they have reforestation responsibility. The timber permit holder and FRIAA's roles need to be clearly identified in the GTA, particularly the debris disposal responsibility*

Once the GTA is endorsed by SRD, the proponents must abide by the commitments outlined in GTAs, as well as other grazing/timber operational standards outlined below. GTAs will form part of the timber disposition holder's Annual Operating Plan (AOP) and will be included in the AOP submission. -If available, GTAs will also form part of the grazing disposition holders Range Management Plan. Specific details are found in the Final Harvest Plan of the AOP-, and the grazing operators approved grazing activities (which may be outlined in formal Range Management Plan if one is required on a specific grazing disposition). GTAs become binding and enforced as conditions of the grazing disposition and timber disposition and related plan approvals. GTA's will be entered into SRD's LSAS system, and would be assignable should either the timber or grazing disposition be assigned to another party

GTAs are not required on existing overlapping dispositions where grazing in regenerating cutblocks is occurring the effective date of this manual and there are no concerns from either operator. They are, however, required where "new" activity (grazing or timber harvesting) is proposed by one or both disposition holders which has the potential to impact the other disposition holder's interests. See procedure 6.0 of the policy directive *Integration of Grazing & Timber Activities* for more detail

The following cost-sharing principles are applicable to the development of a GTA:

- Each party is responsible to communicate their respective interests to the other.
- Each party is responsible for their own costs for assessment and planning.
- Each party is financially responsible for any costs incurred (by the other party) when contractual requirements are not met.
- Cost sharing arrangements must be reasonable, fair and specific to the impact, and be supported by documented evidence.
- Activities by one party that are likely to incur costs to the other party, and how costs are proportionally allocated, should be addressed as part of the GTA.
- Both parties are to be aware of and acknowledge the potential for a claim for damages (e.g., regeneration loss, loss of cattle or significant forage loss) if established requirements within the GTA are not followed or planning/referral/communication obligations have not been met.
- Damage to existing improvements is the responsibility of the party causing the damage.

5.1 A GTA shall be prepared where grazing and timber disposition operations overlap, prior to submission of the timber operator's AOP, and prior to commencement of initial grazing activity on a disposition. The GTA will be submitted with the initial AOP submission annually.[11]. This agreement is to be reviewed by both proponents periodically to assess whether there are changes to grazing or timber operations that would affect the interests of either party, updated if necessary, and endorsed by SRD. The initial GTA must be initiated at least 2 years prior to proposed overlapping operations, with specific details found in the Final Harvest Plan of the AOP. See **Appendix 3** for contents of a GTA, and **Appendix 4** for the GTA template form. The successful new grazing disposition holder whose grazing disposition overlaps a timber disposition can commence grazing as soon as the GTA is agreed to by both parties and is approved by SRD, and all other disposition and regulatory requirements specified by SRD have been met.

5.2 Should either party propose changes to their operations that may affect the other parties' interests, the party proposing the change must contact the other party regarding the change and make a joint decision whether an amendment to the GTA is required.

5.3 The parties developing a GTA are expected to negotiate in good faith to resolve concerns and come to a mutually acceptable GTA. In this context "good faith" means all parties make an effort to communicate and understand each other (phone calls are returned, discussions are respectful) and efforts are made to meet each other's needs (win-win scenario).

5.4 In the Rocky Mountain Forest Reserve it's preferable to have one GTA per allotment area for reasons of efficiency. The GTA can be developed between the timber disposition holder (i.e. FMA) and an association representing permit holders in the allotment, but the permit holders would need to provide written endorsement

[11] For Commercial Timber Permits, the permittee (or a representative responsible for planning ie. FMA holder) will need to develop the GTA with FRIAA and the grazing disposition holder.

of the GTA. However, GTAs between the timber disposition holder and individual permit holders are acceptable.

5.5 GTAs will adhere to SRD standards, policies, procedures, plans, and legislation related to grazing, timber management, reforestation, forest protection, and fish and wildlife conservation and management.

5.6 Impacts to forage productivity and availability due to timber harvest and reforestation operations shall be mitigated and addressed in the GTA.

5.7 Impacts to reforestation due to grazing operations shall be addressed in the GTA.

5.8 Where grazing in regenerating cutblocks is agreed to in the GTA, site preparation and slash management techniques that permit livestock dispersion and access to all forage in the cutover shall be considered in the reforestation prescription. The intent is to avoid damage to regeneration by avoiding concentration of grazing in specific areas of the cutblock.

5.9 With regard to tree planting, where grazing in regenerating cutblocks is agreed to in a GTA, planting of trails that will be used by livestock shall be avoided, or if trails are planted then alternative livestock access is planned and described in the GTA. Planting of coniferous in deciduous grazed cutblocks shall be thoroughly communicated and planned out in the GTA prior to implementation.

5.10 Winter harvest of deciduous stands shall be considered in harvest planning, where grazing of cutblocks may occur. The intent is to ensure maximum vigour of regeneration prior to grazing.

5.11 Proposed cutblock design in the AOP must address areas of high traditional livestock use and maintaining cattle access to forage in such areas. Where cutblocks are planned in areas of high traditional livestock use, cutblocks shall be planned to limit cattle access to cutovers during critical regeneration periods. Where potential access remains high, additional livestock distribution tools should be applied such as salting, watering, and temporary fencing.

5.12 The grazing disposition holder will allow the timber disposition holder access to the grazing disposition for timber harvest and reforestation planning purposes.

5.13 Should either disposition holder intend to assign their disposition to another party, they will inform the other disposition holder as soon as possible, prior to the assignment. The intent is to ensure that the non-assigned disposition holder is aware that there will be a new disposition holder to deal with on GTA-related matters.

Fencelines

5.14 Agreement regarding fenceline timber disposal and cost-sharing arrangements shall be addressed in the Grazing Timber Agreement.

5.15 Fenceline widths shall be a maximum of 10 metres in width, unless otherwise approved by SRD.

5.16 Existing line clearings (e.g. seismic lines, roadways) shall be used as much as possible to meet fencing needs, while minimizing the removal of productive forest land.

5.17 Fences shall be passable for wildlife and forest growth shall not be utilized for permanent fencing.

5.18 Timber for fencelines shall be salvaged and administered in order of preference: FMA, timber licence, or timber permits which overlap the grazing disposition.

Otherwise, timber will be disposed of through local timber permits, or if warranted, commercial timber permits.

5.19 Timber harvest for fencelines and through range improvements shall be completed within 2 years of issuance of the grazing disposition, unless otherwise approved by SRD and agreed to within a GTA.

5.20 The requirement for salvage of low merchantable volumes of timber on fencelines may be waived by SRD, although debris disposal for fire hazard reduction shall be in accordance with the Forest & Prairie Protection Act and SRD policy directive "*Debris Disposal on Agricultural Dispositions*".

5.21 Fencelines less than 2.5 metres in width do not require timber salvage or payment of timber dues to the Crown.

5.22 Reforestation is not be required on fenceline clearings unless otherwise agreed in the GTA, and approved by SRD.

Timber Harvest & Reforestation Operations

5.23 The timber operator shall follow the GTA in the planning and operations of the timber disposition.

5.24 The timber operator shall contact the grazing disposition holder in person or by phone a minimum of 10 days prior to commencing timber operations on the disposition area to discuss access and any other issues that may affect the range management of the grazing disposition. Such contact would also occur during operations prior to making changes that could affect grazing interests. (The grazing and timber disposition holder will have already developed a GTA to be incorporated into the AOP per standard 5.1).

5.25 The timber operator shall reduce the negative impact their timber operations may have on the range management of the grazing disposition. Examples of these impacts include: damage or disruption to range improvements, disruption of livestock distribution patterns, creation of obstacles to livestock movement, impacts to forage availability not addressed in GTA, infrastructure (e.g. fencing, water developments), roads, and bridges. The timber operator is responsible to repair and/or replace any damage to these improvements and infrastructure

5.26 Fences and other grazing infrastructure shall not be disturbed, and gates shall not be opened, without prior arrangements with the grazing disposition holder.

5.27 Gates shall remain closed by the timber operator when not actively in use.

Grazing Operations

5.28 The grazing operator shall follow the GTA in their operations of the grazing disposition.

5.29 Range improvements on grazing dispositions shall be limited to dugouts, trails, and fences and other developments as approved by SRD for livestock management purposes. Applications for range improvements will be subject to the SRD internal referral process outlined in **Appendix 2**. Tame pasture and field development shall not normally occur unless approved by SRD. A timber disposition may be required for proposals that involve timber clearing.

5.30 Dugouts shall be located in suitable areas and within existing clearings or non-merchantable areas, unless approved by SRD.

5.31 The grazing operator shall obtain SRD approval on planned clearing that may involve damage to forest growth pursuant to Section 10 of the *Forests Act.*

5.32 The grazing disposition holder shall contact the timber disposition holder in person or by phone a minimum of 10 days prior to commencing initial grazing operations (initial livestock entry) to discuss access and any other issues that may affect timber or reforestation operations on the timber disposition (eg. Range improvements, fencing). Such contact shall also occur prior to making changes during operations that could impact timber interests. (NOTE: the grazing and timber disposition holder will have already developed a GTA to be incorporated into the range management plan or approved operations as per standard 5.1).

5.33 The grazing operator shall take reasonable measures to reduce the negative impact their grazing operations may have on the forest management of the timber disposition, in particular damage or impacts on forest regeneration.

Grazing in Regenerating Cutblocks

Grazing in regenerating cutblocks can be a contentious matter. Should parties not reach agreement on grazing in cutblocks in the GTA process (GTA's will be required in new dispositions and existing where concerns by one or more parties result in the need for a GTA), SRD will utilize the dispute resolution process and make decisions accordingly. The decisions available to SRD include: withholding of approvals of one or both parties, approval with a condition to resolve the dispute in a reasonable timeframe, initiation of an enforcement process, or other possible actions or recommendations to the disposition holders.

New Grazing Dispositions

The grazing management strategy in the Regional Grazing Plan (RGP) will be to avoid issuing grazing dispositions in regenerating cutblocks or areas with planned timber harvest until the cutblocks have met deferral requirements (outlined in standard 5.33 below). The objective is to protect regeneration during the critical regeneration establishment phase, while preventing reductions in carrying capacity and available forage for grazing. The RGP will assist in avoiding and reducing grazing and timber conflicts.

For new grazing dispositions issued after June 2006, the following standards apply:

5.33 If grazing in regenerating cutblocks has been agreed between the two parties through a GTA and approved by SRD (see Appendix 3 for the grazing management detail required in a GTA), the following grazing practices shall be employed:

- A pre-grazing joint inspection shall be conducted to assess whether regeneration problems do or may exist, or if regeneration stocking and vigour is adequate to accommodate grazing and still meet regeneration standards.
- Stocking rates shall not exceed the ecologically sustainable stocking rates identified in SRD's methodology for calculating carrying capacity and grazing capacity on public rangelands (equates to 25% of total forage available).

- Proper cattle distribution shall be maintained to avoid excessive grazing pressure on areas of the cutblock. Grazing best management practices shall be followed to achieve a light-grazing footprint (less than 30% utilization of forage – see monitoring section of Appendix 3 for measurement details).
- In pure coniferous cutovers, grazing shall be deferred until seedlings are at least 50 cm average height on the cutover, or no sooner than 5 years post harvest.
- In pure deciduous and mixedwood cutovers, grazing shall be deferred until August of the second year following timber harvest, and when regeneration is at least 1.5 metres in height (and conifer is 50 cm average height in mixedwood cutovers).
- Joint inspections to assess effectiveness of practices and regeneration protection (see monitoring standards 5.41 and 5.42 and the monitoring requirements for a GTA in Appendix 3 for more detail).
- Cost sharing arrangements must be reasonable, fair, and specific to the impact, and be supported by documented evidence.

Existing Grazing Dispositions (and Renewals)

Its recognized that avoidance of livestock access and grazing in regenerating cutblocks in existing dispositions and associated renewals is not feasible in areas such as the Rocky Mountain Forest Reserve where grazing has already been allocated through long term allotments. Timber harvest sequencing in forest management planning, and operational timber harvest planning will need to address grazing concerns and cutblock placement to address both grazing and timber disposition holder interests.

For existing grazing dispositions (issued prior to June 2006) the following standards apply (includes renewed dispositions and allotment allocations in the Rocky Mountain Forest Reserve):

5.34 Existing grazing in regenerating cutblocks may continue without requirement for a GTA, unless specifically required by SRD due to a request by either the grazing disposition holder or timber disposition holder. Existing operations will continue on the overlapping dispositions while the GTA is being developed, unless SRD can be convinced that one use is currently irreparably harming another resource. In this case, SRD may consider a temporary partial or total suspension of the use pending completion of the GTA

5.35 A GTA is required in the event of new harvesting activity on a grazing disposition, or new grazing in a cutblock. The GTA must address existing grazing interests such as infrastructure and forage allocation, and timber interests such as effective practices to protect regeneration as outlined in GTA requirements in Appendix 3.

All Grazing Dispositions

The following standards apply to all grazing dispositions, regardless of disposition issuance date:

5.36 Grazing may be deferred from regenerating cutblocks should monitoring indicate cattle grazing damage to regeneration to the point where regeneration standards will not be achieved (see appendix 3, monitoring section for details regarding measurement of grazing impact) Deferral and/or other changes to the grazing regime to re-establish regeneration would be outlined in a revised GTA, and approved by SRD.

Riparian Areas

5.37 Grazing - The health, values, and functions of riparian areas shall be maintained. Riparian health, values, and functions are measured utilizing Riparian Health Assessment manuals[12] produced as part of the 'Cows and Fish' program, which are endorsed by SRD. The standards and assessment of riparian health include assessment of features such as riparian vegetation, banks of water bodies (e.g. - lakes), and watercourses (e.g. streams). Riparian areas are defined in the Riparian Health Assessment manual.

5.38 Where grazing in riparian areas has been approved by SRD, a variety of grazing distribution, utilization, and behaviour tools shall be used to maintain riparian health, values, and functions. These tools include: rotational grazing systems, trail location, salting locations away from watercourses, and fencing (temporary and permanent).

5.39 The range agrologist from SRD will monitor riparian areas for compliance to standards 5.37 and 5.38.

5.40 Forestry - The health, values and functions of riparian areas shall be maintained. Forest industry standards for riparian area protection including buffers, operational standards, and water crossing standards are found in applicable timber harvest planning and operating ground rules and the Code of Practice for Watercourse Crossings. The forest officer from SRD will monitor riparian areas for compliance to these standards. Forest industry standards for riparian area protection are found in applicable timber harvest planning and operating ground rules.

Monitoring

5.41 Joint field inspections by the timber and grazing disposition holder shall be conducted to ensure that operations are as agreed in the GTA, with specific emphasis on monitoring regenerating cutblocks for any potential issues with livestock access or grazing use. It's recommended that inspections occur early so that problems can be rectified, and a phased approach to monitoring is suggested (see the monitoring section in the Appendix 3 GTA requirements). The results of these inspections will be sent to SRD. Monitoring for compliance is an SRD responsibility.

5.42 GTAs may require modification based on the results of joint industry inspections and agreed follow-up actions to address matters of concern.

5.43 SRD will monitor grazing and timber disposition holders for compliance and initiate enforcement action on items of non-compliance as required.

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[12] See www.cowsandfish.org

6. Dispute Resolution Process

Though grazing and timber operators are expected to negotiate in good faith, it is understood that non-agreement and disputes may arise. Though every situation is unique, disputes may occur during development of the GTA, or during operations after a GTA has been approved by SRD. In all disputes SRD's decision will be based on whether parties have negotiated in good faith as outlined in standard 5.3 above.

The objective of the dispute resolution process is a fair and equitable solution, acceptable to both parties.

The following outlines the dispute resolution process to be undertaken by SRD and the parties involved in the dispute. A diagram overview of the process follows on page 20.

Step 1 - *SRD is notified by one or both parties that a dispute has arisen between the parties.* The notification must be submitted in writing to the Range Agrologist (RA) and/or Forest Officer (FO) of SRD, and must outline the nature of the dispute and the respective positions of each party. The notification or complaint must specify whether the dispute is related to a breach of the operating standards found in section 5.0 of this manual (specify which standards are alleged to have been breached), or if the dispute is not related to standards but business-related. Measures and attempts made to resolve the dispute must also be described.

Step 2 - *The RA & FO will assess whether the dispute is related to:*

- *A breach of the standards, legislation, or condition of the disposition(s)*
- *A business-related dispute unrelated to standards or legislation. In this case the following cost sharing principles apply:*
    - Each party is responsible to communicate their respective interests to the other.
    - Each party is responsible for their own costs for assessment and planning.
    - Each party is financially responsible for any costs incurred (by the other party) when contractual requirements are not met.
    - Cost sharing arrangements must be reasonable, fair and specific to the impact, and be supported by documented evidence.
    - Activities by one party that are likely to incur costs to the other party, and how costs are proportionally allocated, should be addressed as part of the GTA.
    - Both parties are to be aware of and acknowledge the potential for a claim for damages (e.g., regeneration loss, lost of cattle or significant forage loss) if established requirements within the GTA are not followed or planning/referral/communication obligations have not been met.

- Damage to existing improvements is the responsibility of the party causing the damage.

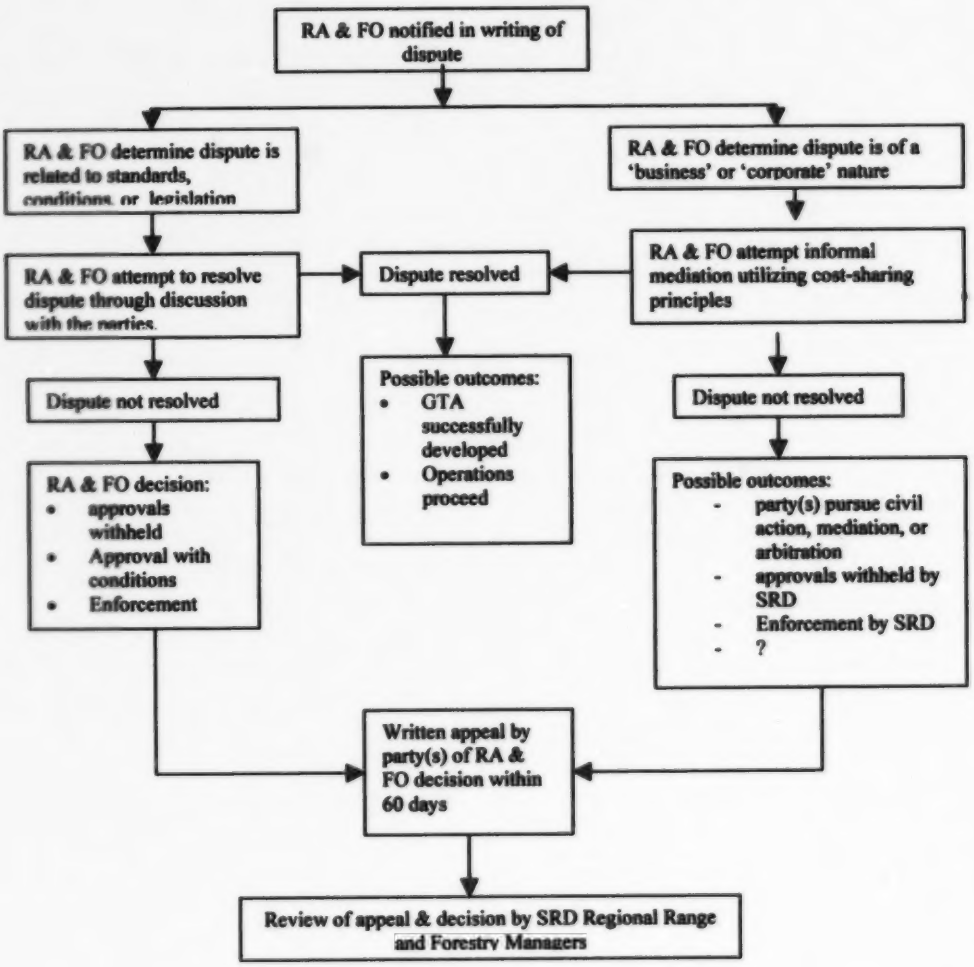
Step 3 - *The RA & FO will attempt to mediate, discuss misinterpretations, and facilitate a resolution.* If this is unsuccessful, a written decision will be provided by SRD to all parties. The decisions available to SRD include: withholding of approvals to one or both parties, approval with a condition to resolve the dispute in a reasonable timeframe, initiation of an enforcement process, or other possible actions or recommendations to the disposition holders.

Step 4 – *Dispute is resolved or not resolved and parties may pursue an appeal of the RA and FO decision to the SRD Range Manager and Forestry Manager or pursue mediation, arbitration, or civil action.* The grazing disposition holder and timber disposition holder agree that in the event of a dispute between them, any attempt at resolution of the dispute, including mediation, arbitration, or civil action, shall incorporate the cost sharing principles listed in Step 3.

Appeal of an SRD Decision

- Either party may appeal the RA & FO (SRD) decision within 60 days of the decision. The appeal must be written, copied to the other party, with reasons for the appeal.
- The appeal will be heard jointly by the Range Manager and the Forestry Manager and a binding decision will be made and communicated in writing to both parties.

Dispute Resolution Process Overview


RA & FO notified in writing of dispute
RA & FO determine dispute is related to standards, conditions, or legislation
RA & FO determine dispute is of a 'business' or 'corporate' nature
RA & FO attempt to resolve dispute through discussion with the parties
Dispute resolved
RA & FO attempt informal mediation utilizing cost-sharing principles
Dispute not resolved
Possible outcomes:
• GTA successfully developed
• Operations proceed
Dispute not resolved
RA & FO decision:
• approvals withheld
• Approval with conditions
• Enforcement
Possible outcomes:
- party(s) pursue civil action, mediation, or arbitration
- approvals withheld by SRD
- Enforcement by SRD
- ?
Written appeal by party(s) of RA & FO decision within 60 days
Review of appeal & decision by SRD Regional Range and Forestry Managers

Appendix 1 – *Regional Grazing-Timber Integration Advisory Committees – Draft Terms of Reference*

Purpose

To foster shared planning and good relations.

To advise Alberta Sustainable Resource Development (SRD) in the successful and sustainable integration of grazing and timber operations in a defined region, where grazing and timber uses are shared.

To discuss with the grazing and timber operators who work on the common land base on how to better integrate their respective operations.

Scope

The Regional Grazing Timber Advisory Committee (RGTAC) would provide advice to SRD in matters of grazing timber operations integration, planning, operations, and education and awareness.

- the Committee is not a dispute resolution mechanism;
- the Committee is not a delegated authority;

Regional Planning Area

- Only one RGTAC per regional grazing assessment planning area.
- In many cases the same RGTAC can represent more than one regional grazing assessment planning area.
- SRD Forestry and Range Managers would approve the relationship between advisory committee and planning area to avoid duplication and overlap.
- Consider local industry membership in existing grazing timber integrated committees, eg. NW Region Timber Grazing Integration Committee. Using existing local industry reps would conform to following the RGTAC terms of reference.
- Expansion of the minimum requirements for a Grazing Timber Agreement will be considered by SRD for region-specific issues identified by the Committee. Such additions would only be applicable to the Committee's region.

Deliverables

The RGTAC reports to the Forestry and Range Managers, and assists SRD with the following deliverables:

1) Advise on the planning area for a Regional Grazing Plan (RGP);
2) Advise SRD in grazing timber matters pertaining to policy and planning;
3) Advise SRD regarding lands that have been identified for integration must be planned to accommodate both industry sector's need. Monitor implementation of the RGP and review it from time to time to ensure it is based on a current evaluation

of the land conditions, and the best available science. Provide advice about longer term integration planning;

4) Partner with SRD to conduct applied research and demonstration projects that will foster increased grazing timber knowledge, tool building, and stewardship;

1) Facilitate education of the members (standards, legislation, policy, operational practices).

2) Provide a forum for peer-to-peer discussions regarding potential beneficial research, practices or concerns;

7) The local representatives and their affiliated groups (e.g. Grazing Advisory Councils and Forest Public Advisory Groups) will assist SRD in providing awareness to their individual disposition holders and assist in the development of information relative to developing RGP and GTAs; and

8) Each sector is to provide known concerns from its membership and communicate with their membership and stakeholders to assess potential concerns or input to the RGP. Examples of stakeholders: local farming community, forestry advisory committees. Its not practical to have all stakeholders at the table developing the RGP, however, SRD will assess and provide potential concerns from stakeholders such as trappers, guides/outfitters, and other local interests.

9) Each sector will provide the necessary resources (ie. negotiation training) for its constituents to participate as "equal partners" in the process.

Membership

- Local representation from the industry sectors - local timber companies and local grazing industry. The Alberta Beef Producers will appoint their representatives.
- SRD, while not a member of the committee, will provide a resource information and support role to the Committee. SRD staff involved may include the local range agrologist, forester/forest officer, fisheries biologist, wildlife biologist, or wildlife officer
- A maximum of 2 local representatives from the beef and timber industries on each RGTAC, unless otherwise approved by SRD. (Note: there may be a need to increase representation for large RGP planning areas).
- "Shadow" representatives from either industry or SRD may attend as observers to the process and as potential alternates for primary representatives if they can't attend a meeting. The intent is to allow for participation and observation of discussions, and to assist in continuity of committee work if a primary member misses meetings.

Chair

The chair for the RGTAC shall be co-chaired by representatives from the Beef and Timber Industry. The process for choosing co-chairman will be established by the RGTAC (ie. vote, consensus).

Meetings

A minimum of one meeting per year. Minutes will be recorded by an appointed secretary. Agendas will be developed by co-chairs, with input from RGTAC members.

Expenses

Individual members are responsible for their expenses, which may include arranging for expenses to be paid for by the industry member's respective organization. Government to provide logistical and meeting place support.

Appendix 2 – *Guidelines to Process Land Disposition Request (LDR) Applications for Grazing*

1. Land Disposition Request (LDR) Application Process

This process applies to current practice of issuing grazing dispositions where the location does not change over time (Option 1 in Regional Grazing Plan Management Options).

Grazing interest contacts Sustainable Resource Development (SRD) representative - Rangeland Agrologist (RA). The RA discusses with grazing interest the Regional Grazing Plan (RGP) map and accompanying information fact sheet (see example below). The grazing interest will be advised about the responsibilities of applying for grazing and whether grazing in regenerating cutblocks will be allowed. The grazing interest considers information and decides to make an informed application to SRD for grazing in the green area or available white area. Land Disposition Request (LDR) application for grazing automatically comes with the information fact sheet (example below). Applicant fills out LDR application and provides required information including the legal location of grazing interest, and approximate Animal Unit Months (AUMs) of forage required.

LDR application is received by the Dispositions & Technical Services Branch (DTSB) who then notify the Rangeland Agrologist (RA). The application is then referred by the RA to the Forest Officer/Forester (FO) for joint decision-making. The LDR application for grazing can be accepted for auction or tender advertisement or rejecting the application. A joint decision completion date is estimated up to 6 months. The RA and FO take the following steps:

Step 1 *- RA completes a land standing check and refers application to Forest Officer (FO), Fish and Wildlife Division (FWD), and other appropriate resource agencies and interests.*

i. RA and FO use the Regional Grazing Plan (RGP) information, eg. carrying capacity, timber and reforestation information.

ii. RGP not available, RA and FO begin evaluating the location and carrying capacity of the lands applied for.

iii. FWD provides comments and input back to RA as per referral timelines.

Step 2 *- RA may contact the applicant for more information and conduct field checking.*

The RA and FO will know if the grazing application is in a non-overlap or in a current or near future overlap situation.

The RA and FO may make a joint decision to reject the LDR application or continue processing the application further (Step 3). **Should specify the reasons for rejection.**

If rejected, the RA will notify DTSB who will send the rejection letter. DTSB will forward copies of the rejection letter to the RMB, FO and FWD.

***Step 3** - Refinement of the Land Disposition Request(LDR) Application Area, Field Checking, & Referral to Stakeholders*

The Range Agrologist (RA) and Forest Officer/ Forester (FO) will use the Regional Grazing Plan (RGP) information and referral information to develop a 1:20,000 grazing timber map. Where an RGP does not exist, the business rules in sections 4 a) and b) of the grazing timber integration manual will be utilized to determine lands available and not available for potential grazing.

The RA refers the LDR application area to Fish and Wildlife Division (FWD), Forest Protection Branch (FPB), and other required agencies. These divisions and agencies provide input back to the RA according to the referral timeline.

The FO will refer application to forest industry stakeholders and provide comments to the RA relative to the management of the forest resource and input received from the Forest Management Agreement & Quota Holders, and if applicable, the Forest Resource Improvement Association of Alberta (FRIAA). [13]

If the LDR application is an overlap situation, the map will show the timber harvest plans and reforestation concerns (e.g. planned and present cut blocks that have reforestation concerns and the grazing capacity (AUMs). Changes may be made to the grazing timber map to address operational level concerns such as timber and reforestation, watershed, fish and wildlife, range management, etc.

The boundary of the LDR application for grazing may be modified to take advantage of existing physical features and situations such as locating the boundary of the LDR application using power lines, pipelines, seismic lines, roads or cover types that will be practical to grazing and fenceline construction, minimize timber land taken out of future production, and to minimize effects on watercourses and water bodies.

***Step 4** - The RA and FO will jointly review and make a decision regarding the application. The RA will recommend the area for advertisement purposes.*

The LDR application area will be advertised for grazing. The advertisement (public auction/ tender) will include a "long sheet" which provides the grazing timber map, boundary of grazing area, carrying and grazing capacity, responsibilities for the potential successful bidder for grazing disposition, and information fact sheet. SRD will provide the RGP map.

***Step 5** – Issuance of the Grazing Disposition*

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[13] FMA holders are always consulted, quota holders when they have an active timber licence, timber harvest plans in the next 10 years, or regenerating cutblocks in the LDR application area. FRIAA is consulted on regenerating cutblocks within the LDR application area.

A condition of the grazing disposition contract will include the requirement for a Grazing Timber Agreement (GTA).

Sustainable Resource Development (SRD) will inform the grazing disposition holder about debris management requirements on fencelines.

The Range Agrologist (RA) will notify the Forest Officer/ Forester (FO) about the SRD approved grazing disposition and grazing disposition holder.

The FO will notify the timber disposition holder and interests that a grazing disposition has been issued, and that a Grazing Timber Agreement (GTA) is required between both disposition holders.

In the case of an overlap disposition, SRD will provide responsibilities for grazing and management in grazing dispositions that contain planned timber harvests and cut blocks with reforestation interests. These responsibilities must be addressed in the GTA.

***Step 6** – Development of a Grazing Timber Agreement*

The grazing and timber disposition holders communicate and work together with SRD to develop a Grazing Timber Agreement (GTA).

A copy of the GTA is forwarded to SRD (e.g. RA and FO) for approval and placed on both disposition contracts.

Note:

In the case of a disagreement between the RA and FO, the next level of joint decision making authority will review the disagreement (e.g. Assistant Rangeland Manager and Senior Forester).

2. Example Grazing Timber Information Fact Sheet

The fact sheet will include the following grazing timber information to further assist the grazing applicant in making informed decisions concerning applying to SRD for grazing in the green area and white area lands with timber commitments. DTSB will be consulted in the finalization of the fact sheet.

AUCTION OF GRAZING LICENCE RIGHTS
ON ALBERTA PUBLIC LANDS

Location of Auction:
Date of Auction:
Time:

Legal Description and Location:

Legally describe and attach a sketch. All existing surface dispositions and/or authorities will be excluded from the final acreage. Describe where these lands are located relative to a town, city, etc.

The department encourages multiple use of public land and contact between other users (e.g. recreational users) and grazing disposition holders. As a grazing licence does not grant the holder exclusive use of the area, this goal of multiple use and access can be achieved. Availability of use/access by others is a consideration at the time of disposition renewal.

CONDITIONS OF TENDER AND TERMS OF PAYMENT

Bidders must be 18 years of age or older, and Canadian citizens or permanent residents of Canada.

Employees of the Government of Alberta may not bid unless it is done in compliance with Section 24 of the *Public Service Act* and Article 4.4 of the Code of Conduct for the Public Service.

Anyone submitting a bid on behalf of an association or corporation must ensure that the organization is eligible in accordance with the regulations, and provide evidence of the status of the organization. A list of the shareholders in the corporation showing names, addresses, citizenship and number of shares held by each shareholder must be submitted, along with the bid.

Alberta Sustainable Resource Development reserves the right to withdraw any of the lands from the auction, or to include any other lands therein.

The disposition will be subject to the Dispositions and Fees Regulation, and must be grazed by livestock belonging solely to the successful bidder. Livestock, as defined in the *Public Lands Act* (i.e. cattle, horses and sheep), may be grazed on the licence area.

The successful bidder will be issued a grazing licence effective __ , and is responsible for payment of annual grazing rental and municipal taxes when applicable. A $10.00 administration fee plus $0.70 GST (total $10.70) is also payable prior to issuance of the disposition.

The grazing licence will be issued to the successful bidder only in the name(s) listed on the auction declaration tender bid submission form. Changes will not be accepted.

Access to the land under disposition is not included as part of the disposition. The disposition holder will be responsible for ensuring that access to the land under disposition is available, and suitable for the disposition holder's needs.

Normal fencing and utilization requirements will apply, and no range improvement may be carried out on the land unless prior written authorization has been obtained from this department. Also, please note that some areas may have very limited development potential.

The *Line Fence Act* applies and arrangements with the adjoining landowners and/or former occupant(s) regarding the use or purchase of any perimeter fences is the responsibility of the successful bidder.

The successful bidder is responsible for payment of any outstanding debts he/she owes the department.

Should the successful bidder fail to submit any requested rental payment within 30 days of the licence being issued, the bonus bid amount will be forfeited and the disposition cancelled.

The current carrying capacity of the land is considered to be _____AUM's (Animal Unit Months) of use annually.

Additional AUM's may be available for limited periods of time during the term of the disposition when integration with timber management objectives permits. These AUM's may be allocated to the disposition holder at the discretion of the department and subject to payment of appropriate rental fees and may be withdrawn upon notice of the department prior to commencement of the grazing season.

The total area of public land leased by a disposition holder should not exceed an area sufficient to graze 600 animal units for a calendar year (7,200 AUM's).

All clay, silt, sand, gravel, topsoil and peat (surface materials) on the said land are expressly excepted from this disposition.

The holders of any exploration approval under the *Public Lands Act* and *Mines and Minerals Act* are to be allowed access for the purpose of conducting an exploration program in accordance with the approval granted by Sustainable Resource Development.

Unless authorized in writing by the Minister, the grazing licence holder shall comply with the Operating Standards for Grazing and Timber Integration, as specified in the Grazing and Timber Integration Manual, 2005, published by Sustainable Resource Development, as amended.

A Grazing Timber Agreement (GTA) shall be prepared where this grazing disposition overlaps a timber disposition, prior to commencement of grazing activity on this disposition.

Fence line clearings may be a maximum of 10 metres in width. The successful bidder(s) must contact the local Public Lands and Forest Office to establish and obtain approval for the appropriate fence line clearing width, and SRD debris disposal requirements to minimize wildfire hazard.

All merchantable timber must be harvested while the authorized clearing is carried out. The right to cut and remove this timber will depend on the total volume involved, and on local procedures and conditions for securing timber permits.

The holders of any timber permits or licences for lands under this licence are to be allowed access for the purpose of removing timber.

The disposition area shall not be grazed between March 1 and June 15 of each year, unless authorized by the department.

The disposition holder must conduct weed control, as required by the department and/or the local municipality.

The successful bidder may be required to enter into a Resource Management Operational Plan to facilitate the use of various resources of the land.

The lands covered by the Grazing Licence are managed for the sustainable timber production. Grazing management may have to be adjusted through relocation of livestock or fencing of cut blocks during logging and reforestation operations and until such time as regeneration of timber has achieved satisfactory levels of performance to a degree where grazing is considered compatible. Livestock grazing must be managed to maintain the ecological health and function of all lands within the disposition, including grasslands, forested pastures, water bodies, wetlands and riparian ecosystems. The disposition holder must comply with any direction from the department with respect to meeting range and riparian health objectives.

The successful bidder must contact oil/gas disposition holders within the disposition area to discuss operational integration of new proposed grazing infrastructure with oil/gas infrastructure (such as fencing, gates, road access/ location, and communication protocol)

Prior to fenceline construction, the successful bidder is required to contact the holder of any registered trapline(s) on the grazing disposition to discuss coordination of trapline access and gates.

The successful bidder must construct and maintain a fence around the sample plots located in LSD xx of Section xx-xx-xx-W5 and LSD x so that livestock does not have access to the sites.

This is a one time bid for grazing rights to the land for the term as specified above, and is over and above the regular rental, fees and taxes when applicable. The amount bid is payable for the current season only.

DISPOSITION OF THIS LAND IS SUBJECT TO A MINIMUM RESERVE BONUS BID OF $100.00 PLUS GST.

Each bid is to be submitted on a tender form provided by the department, and must specify the unit to which it applies. Each bid must be accompanied by a postal or bank money order or certified cheque equal to the full amount of the bid being offered plus GST, made payable to the Minister of Finance, Province of Alberta. No single bid may cover more than one unit. Any bid covering more than one unit will not be accepted.

The offer is to enclosed and sealed in a tender envelope provided by the department. All envelopes containing bids should have return addresses, and must be marked as follows:

Tender for Grazing Licence
Land Description: Section xx-xx-xx-Wx
Tender Closing: (insert day of week and date)

All tenders delivered in person or by courier must have the above information including the word "TENDER" clearly marked on the courier/tender envelope. They must be delivered to, and signed for by Alberta Sustainable Resource Development, Public Lands and Forests Division, 5th Floor, South Tower, Petroleum Plaza, 9915 – 108 Street, Edmonton, Alberta, T5K 2G8, prior to 2:30 p.m. on the tender closing date, in order to be considered.

The highest or any bid will not necessarily be accepted, and improperly submitted bids will not be considered. Cheques or money orders of the unsuccessful bidders will be returned. No bidder shall be at liberty to withdraw or countermand a tender, once it is made.

Upon being advised that a tender has been accepted, should the successful bidder fail to submit any requested rental payment within 30 days of the licence being issued, the amount tendered will be forfeited to the disposition cancelled.

All tender details including names and amounts bid become public information after the tenders have been opened, and a bid accepted by the department.

NOTE
For further information, please contact:_____, in Edmonton, at (780) _____, or the local area agrologist, _____, in _____ at (780) _____

These telephone numbers may be reached toll free by dialing 310-0000.

Appendix 3 – *Grazing & Timber Agreement Requirements*

The following information is required in a GTA:

- ⇒ **Objective**
- ⇒ **Contact Information**
- ⇒ **Grazing & Timber Strategies & Mitigation Measures – including map**
- ⇒ **Communication & Dispute Resolution Procedures**
- ⇒ **Monitoring Procedures**
- ⇒ **Endorsement – by both operators and SRD**

1. **Objective – We commit and agree to minimize the impact on both the timber and range resources and operations while protecting other resources and values.**

2. **Contact Information for Grazing and Forest Operators**

   - **Date and Location**
   - **Grazing disposition number**
   - **Timber disposition identification (Timber commitments (FMA, Quota, etc) for area**
   - **Disposition holders names**
   - **Contact names**
   - **Mailing Address, Phone, Fax and E-mail**
   - **Map of Range and Forest Resource Information**

3. **Grazing and Timber Strategies and Mitigation Measures**

This section consists of a brief description of operations, potential impacts, and mitigation strategies to reduce impacts on each other's operations.

Description of timber and grazing operations

- **Describe timber harvest operations/planning (past, present – future).**
  Address:Cutblock design and locations
- **Season and duration of operations**
- **Slash and debris handling**
- **Stump height**

Describe the overall grazing management plan (season, rotations, class of livestock, etc.) (past, present – future)

Potential Impacts and Mitigation Strategies

List all potential impacts and mitigation strategies related to infrastructure, timber harvest, grazing, reforestation and reclamation. It is recognized that not all items may be applicable in specific areas of grazing timber overlap. For example, fenceline development may be the only concern from a timber standpoint if timber harvest isn't planned in the grazing disposition in the near future. These strategies must conform to standards outlined in this manual, as well as department standards and legislation for environmental protection, fish and wildlife, forest management, forest protection, and rangeland management.

Examples of potential impacts of grazing and timber operations:

- **Damage to existing improvements such as fences, gates, etc.**
- **Loss of natural barriers**
- **Introduction of weeds**
- **Timber damage**
- **Changes to livestock behaviour**
- **Loss of AUM's**
- **Access management – unnecessary roading, blocked access to other user, etc.**
- **Damage to forage resource/AUMS**
- **Damage to infrastructure**
- **Overgrazing/damage to regeneration**
- **Damage to riparian areas**
- **Soil compaction in cutovers with fine-textured soils and moderate/poor drainage**
- **Cutovers don't meet regeneration standards**
- **Scarification and debris impacts AUMS and cattle movement to forage and water sources**

The following are some potential impacts and mitigation strategies that must be considered and described in sufficient detail in all GTA's:

Access

Describe how proponents will access their dispositions with the aim of reducing the access footprint on the land base. Potential mitigation strategies include:

- **Shared road corridors**

Timber Harvest

Describe how will harvesting occur with range operations addressing: grazing infrastructure protection, maintenance of access to forage, natural fenceline barriers,

timber salvage as a result of fenceline development/ range improvements. Potential mitigation strategies include:

- Specific reforestation and debris management tactics to maintain livestock access to forage and water source areas
- Timing of operations

Grazing Management

Describe strategies for protection of regeneration addressing: 1) Any variation proposed from standards described in the manual, 2) Joint monitoring schedule, 3) Action plan if regeneration is being negatively impacted due to grazing, 4) Agreement regarding compensation. Some potential strategies to avoid damage to regeneration in addition to practices outlined in Section 3.0 of the manual:

- Avoiding tree planting in traditionally used livestock trails.
- No salting on cutblocks
- Watering site selection
- Herding
- Timing of grazing operations on an annual basis to avoid critical regeneration periods (late season grazing).
- Utilization – managing grazing in cutblocks so that cattle utilization of the forage does not exceed 30%. Heavy utilization of the forage increases the risk to damaging forest regeneration.For existing dispositions, deferral of grazing may be necessary, particularly where regeneration issues are evident due to monitoring.

Weed Control

Strategies from both proponents of how invasive species will be monitored and controlled in a cooperative manner.

Fencelines

Describe who will establish and maintain fencelines and the cost-sharing arrangement in accordance with the cost-sharing principles described in the standards manual for GTAs. This is applicable to fencelines as a replacement to harvested natural barriers as well as any fencing that may be required for regeneration protection.

GTA Mapping Requirements

- Fence and gate locations
- Existing and planned roads and access trails
- Watering and salting areas

- Springs, mineral licks, sensitive areas, or other identified wildlife habitat features (i.e. thermal cover, bear dens, nesting sites, species at risk)
- Location of any range improvements
- Weeds, type, extent and location
- Location and type of watercourses, livestock crossing points, and crossing structures (e.g. Bridge, culverts)
- Location of natural fence barriers to livestock movement
- Range inventory
- Forest cover inventory
- Boundary of timber and grazing dispositions
- Location of infrastructure, roads, bridges
- Location of present cut blocks
- Location of native or seeded grasslands
- Location of other land uses – oil/gas pipelines and well sites, geophysical, trapper cabins, sand & gravel, recreation
- Future planned developments – authorized range improvements, fences, gates, roads/access trails, proposed cut blocks, proposed reforestation activities, and land uses (if known).
- Any other information deemed relevant by the grazing and forest operator

The map is to a 1:20,000 scale or as approved by SRD. Items above need to be clearly identified on the map, particularly existing versus proposed developments. Not all items will be necessary depending on the nature of the timber and grazing activity. For example, if no timber harvesting is planned, or regenerating cutovers are in the boundaries of the grazing disposition, related information is unnecessary.

4. Communication Procedures

Description of how the proponents will maintain communication, how frequently, and instances that would require joint discussions. Describe how disputes will be addressed.

5. Monitoring Procedures

Describe the monitoring procedures for the dispositions including frequency, and instances that would necessitate joint inspections. (Note the standards 5.35 and 5.36 regarding inspections). A phased or stratified approach to monitoring of regenerating cutblock is suggested. Frequent monitoring should occur during the critical regeneration period (up to 5 years post harvest for coniferous cutblocks, and 2 years post harvest for deciduous and mixedwood cutblocks). A suggested phased approach to monitoring:

Level 1 – ROUTINE - Monitoring during the grazing disposition holder's routine checking of cattle and grazing operations/ maintenance. Grazing disposition holder

carries out informal monitoring in cutblocks during the critical regeneration periods (up to 5 years post-harvest in conifer, and up to 2 years in deciduous). Observations focus on livestock presence in cutblocks, forage utilization, and any signs of livestock damage to regeneration. Level 1 monitoring continues unless a concern is identified ie. greater than 30% utilization and/ or damage to regeneration (even if damage is not related to livestock grazing). If there is indication of damage to regeneration due to grazing or trampling, the grazing disposition holder contacts the timber disposition holder to undertake jointly Level 2 monitoring.

Level 2 – JOINT - Timber and grazing disposition holder inspect regenerating cutblock to review grazing presence, forage utilization, and regeneration. Determine if livestock trampling and/or browsing may be a factor. If not, go back to continued Level 1 monitoring. If livestock damage is a factor, then disposition holders to discuss and agree on adjustments to grazing practices which may also necessitate a change to the GTA. Joint monitoring will continue until its been determined that the adjustments to grazing practices are not damaging regeneration. Exclosures may be required to do this assessment. If damage continues, may need to consider rotation of stock to other grazing management units, temporary fencing of the problem area of the cutblock until the critical regeneration period is complete, etc. If damage ceases, then go back to Level 1 monitoring.

The following is a checklist for the grazing and forestry operator to review and sign off as a result of joint inspections, as necessary. Where problems occur they should be recorded and resolutions agreed upon in writing. A copy of this checklist is maintained by each operator and submitted to SRD once completed.

- Condition of fences and gates
- Condition of natural barriers used as fences for managing cattle movement
- Location and extent of invasive species, such as noxious weeds
- Grazing rotations are operating satisfactory
- Access is satisfactory for grazing and forestry operations
- Discuss any new grazing or forestry activities, e.g. fencing, improvements, timber harvesting and reforestation.
- Reforestation of existing blocks (concerns w/ grazing and tactics to mitigate, or concerns with reforestation practice and tactics to mitigate).

6. Endorsement & Confidentiality

Both parties acknowledge that they agree with the GTA and will implement the strategies identified herein. The parties are also agreeing not to release the GTA to others unless agreed between the operators and SRD.

- Signatures of both grazing and forest operator.
- Endorsement by SRD – Forester and Range Agrologist

Appendix 4 – *Grazing Timber Agreement Template*

This GRAZING & TIMBER AGREEMENT (GTA) has been discussed and endorsed by the proponents below to promote the better management and sustainability of Timber and Grazing Operations.

Timber Proponent Information		***Grazing Proponent Information***	
Company Name:		***Company Name:***	
Address:		***Address:***	
Phone:		***Phone:***	
Fax:		***Fax:***	

Operational Plans: Provide in detail a description of past, current and future activities that will affect the outcome of this GTA. Attach sheets if more detail or space is required. Attach map with required information.
Timber:
Grazing:
Potential Impacts: Provide a detailed account of all the potential impacts that will be created by your integrated operations. Attach sheets if more detail or space is required.
Mitigation: Describe in as much detail required as to how both proponents will ensure that all potential impacts are dealt with to allow both operations to continue. Attach sheets if more detail or space is required. Specifically;
Effects to Regeneration:

Effects to Forage:
Effects to Riparian Areas:
Effects to Grazing Infrastructure & Access Management:
Monitoring & Communication: Describe in detail what monitoring, communication, and dispute resolution processes both proponents will utilize
Fencelines: Describe required fencing and cost-sharing arrangements
We the undersigned agree with the Terms of the Grazing Timber Agreement and will implement the strategies identified in the plan.
Signed: ***Signed:***
Representative for: ***Representative for:***